



DRAFT DETERMINATION RESEARCH 2024

Summary report – United Utilities

Prepared for Consumer Council for Water and Ofwat
Prepared by Impact Research

October 2024



United Utilities: key points...

Household finances

14% of billpayers struggled to pay at least one household bill in the past year, either most of the time or all the time.

17% billpayers currently find it quite or very difficult to manage their finances.

Looking to 2030, 35% of billpayers think their household finances will get worse by then and 31% better.

Water bill affordability

45% find their current water bill easy to afford; this falls to 26% for the proposed bill from 2025-2030.

17% find their current water bill difficult to afford; this increases to 38% for the proposed bill.

United Utilities billpayers who would not find the proposed bills easy to afford were asked what they would do to help pay for the increase in their water bills. Most would spend less on non-essentials (60%) or use less water (42%)

Acceptability of investments

78% find the investments acceptable, with the most commonly cited reasons being that the proposals focus on the right services (47%) and support for the longer term (36%).

However, when billpayers consider the proposed bill changes, acceptability goes down from 78% to 60%.

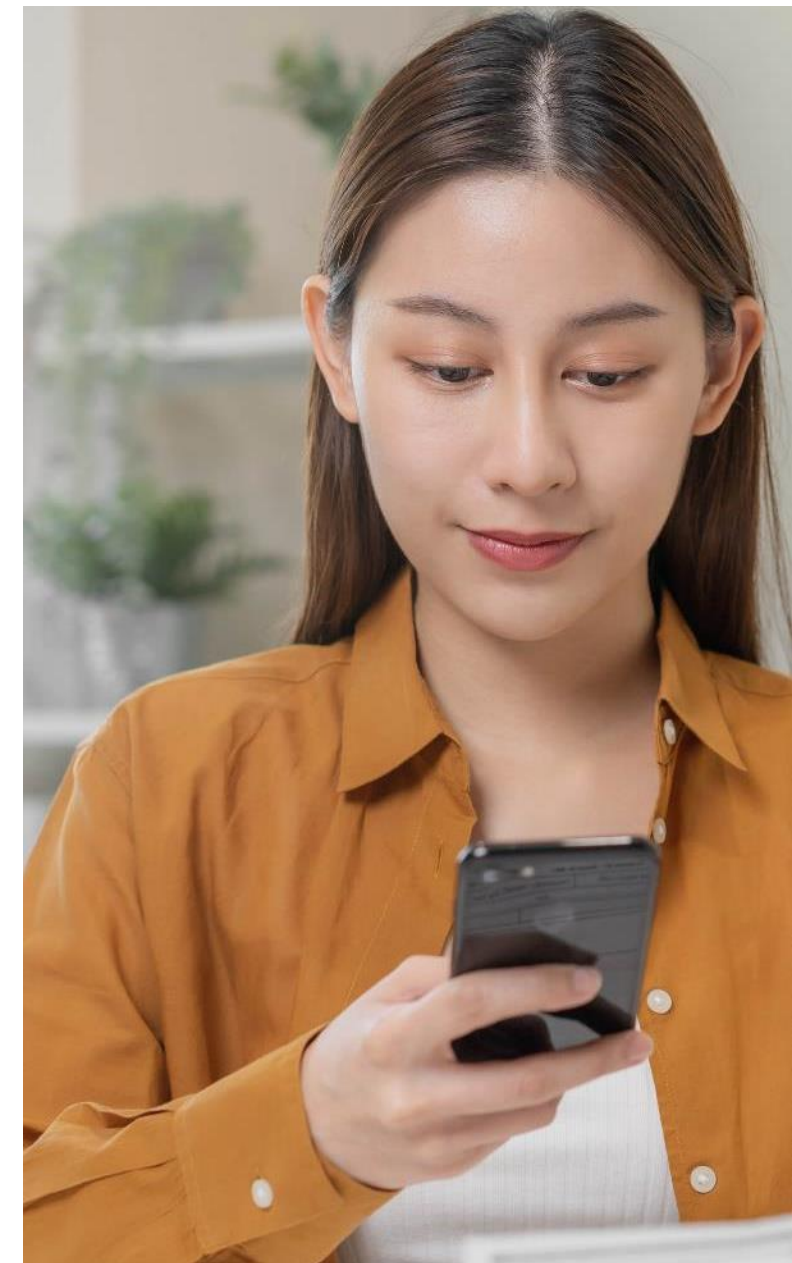


RESEARCH OBJECTIVES

The primary purpose of the research was to gauge the opinions of water companies' customers about Ofwat's Draft Determinations, published in July 2024.

THE RESEARCH AIMS TO DETERMINE:

- Affordability of current household water bills and proposed 2025 – 2030 bills.
- Acceptability of proposed service levels and investments and determine which investment areas are more important to customers.
- Where views in the nations of England and Wales are different to the total combined view across England and Wales.
- Identification of water companies which are outliers from the total combined view across England and Wales.
- Additionally, this research aims to compare these Draft Determination results to the Business Plan research conducted by each water company as set out in the Affordability and Accessibility research guidance.



500 United Utilities customers were interviewed;

| | |
|----------------------|---|
| RESEARCH TYPE: | An online quantitative survey with an option to participate through a paper questionnaire. |
| TARGET: | A representative sample of United Utilities billpayers (who are at least jointly responsible) aged 18+ . Participants must have been customers of United Utilities and be aware of who their supplier is. Industry exclusion was applied. Data were weighted to reflect the population of the United Utilities customer base. |
| SAMPLE SOURCE SPLIT: | The sample was drawn from two sources: online panels managed by Prodege and customer databases from United Utilities. |
| SAMPLING METHOD: | Online panel participants were invited via email invite. The customer database was contacted through 'push-to-web' approach – either emails or postal letters with a survey 'push-to-web' link. |
| SAMPLE MODE SPLIT: | 374 through the online panel, 121 push-to-the web through an email invite, 5 push-to-the web through postal letter invite, 0 postal. |
| QUESTIONNAIRE: | 15 minutes long on average , available in English. The questionnaire was tested before the main launch through cognitive interviews and a pilot survey to ensure clarity, relevance, and effectiveness in capturing accurate responses from participants. |
| FIELDWORK: | Data was collected from 1 st August 2024 to 26 th September 2024. |

Billpayers were initially asked about their **financial situation** and the **affordability of the current bill**.

Then, they were presented with the **proposed bill**, including water & sewerage charges and inflation and asked about affordability based on these changes.

Billpayers were then informed about United Utilities's **performance and investment plans** before being asked about the **acceptability of the proposals**.

Acceptability was then sought again, with a reminder of the proposed bill changes linked to the investment plans.



A quantitative approach was adopted, the majority of interviews conducted via an online survey.

Online panelists or water company customers were invited to participate through an email invite or letter with a link to the online survey. Customers of water companies were given the option to ask for a paper postal questionnaire to include those digitally disadvantaged.

Data were weighted to match the customer profile of United Utilities to match the 2021 census profile for gender, age and socio-economic group (SEG).

Additional analysis found that there was a difference in responses from the online panel sample and the push-to-web sample around the affordability of bills, over and above variations in demographics. **The general effect of push-to-web vs. panel was to lower the proportion of customers saying that paying their bill was 'easy'.* We therefore applied a further level of weighting to adjust the proportion of survey mode (panel vs. push-to-web) within each company, to approximate as closely as possible the mix of these two modes over the whole sample.**

- All reported **base sizes are unweighted**; all % reported are **weighted**.
- **Significance testing** (on a 95% confidence level) has been applied **to compare vs. the total figure for England and Wales (i.e. all water companies) combined**.
- **The margin of error** e.g., 50%: England +/-1.1%, Wales +/- 3.1%, water company +/- 4.4% (assuming base of 500).
- Key **scale questions**, e.g., affordability, have been **netted** for simplicity. E.g., very easy & quite easy have been combined into **NET easy**.
- When referring to **'water bills'**, it includes sewerage charges as well.
- When referring to **Total**, this means England and Wales combined.



* This effect could be due to the mode of contact or the presentation of a personalised bill profile in the push-to-web sample vs an average bill profile in the online panel sample.

SUMMARY OF RESULTS – FINANCIAL SITUATION

Before asking about their current and then proposed bills' affordability, respondents were asked how they felt about their household finances and how well these were going.

14% of United Utilities billpayers struggled to pay at least one household bill in the past year, either most of the time or all the time.

17% of United Utilities billpayers currently find it 'quite or very difficult' to manage their finances. Looking to 2030, 35% of billpayers think their household finances will get worse by then and 31% better.

| COST OF LIVING | TOP 2 / BOTTOM 2 NET % | PROPORTION FOR UNITED UTILITIES | RANGE FOR ALL WATER COMPANIES (ENGLAND AND WALES) | AVERAGE PERCENTAGE FOR ALL WATER COMPANIES (ENGLAND AND WALES) | AVERAGE PERCENTAGE FOR ENGLAND AND WALES |
|---|--|---------------------------------|---|--|--|
| STRUGGLE TO PAY AT LEAST ONE HOUSEHOLD BILL | Rarely or Never | 59% | 51% - 66% | 57% | 57% |
| | All or most of the time | 14% | 11% - 20% | 16% | 15% |
| CURRENT FINANCIAL SITUATION | Living comfortably or doing alright | 45% | 43% - 61% | 47% | 47% |
| | Finding it quite difficult or very difficult | 17% | 12% - 22% | 18% | 18% |
| CHANGE IN BILLPAYER FINANCIAL SITUATION BY 2030 | A bit or a lot better | 31% | 25% - 35% | 29% | 29% |
| | A lot or a bit worse | 35% | 32% - 45% | 36% | 36% |

Arrows next to the numbers mark significant differences from the Total for England and Wales, ↑ = significantly more ↓ = significantly less on a 95% confidence level.

Q1: Thinking about your household's finances over the last year, how often, if at all, have you struggled to pay at least one of your household bills? BASE: ALL (500)

Q2: Overall, how well would you say you are managing financially now? BASE: ALL (500)

Q3: Thinking about your household's financial situation over the next few years up to 2030, do you expect it to get: BASE: ALL (500)

11/4/2024

Produced by Impact Research Ltd in strict confidence

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SUMMARY OF RESULTS - AFFORDABILITY

After the introductory questions, participants were asked how easy or difficult it is to afford their current water bill.

Each billpayer was then presented with a bill profile chart including the current 2024/2025 bill and proposed annual bill changes up to 2029/2030, and the impact of inflation.

Respondents in the 'push to web' sample saw a bill profile based on their current bill; respondents in the online panel sample saw a bill profile based on the current household average bill for United Utilities customers. The bill profiles included forecast inflation.

Nearly half of United Utilities households find their current water bill easy to afford, while a sixth say it's difficult to afford. **The affordability of the proposed water bill drops to 26% from the current 45% .**

| AFFORDABILITY | TOP 2 / BOTTOM 2 NET % | PROPORTION FOR UNITED UTILITIES | RANGE FOR ALL WATER COMPANIES (ENGLAND AND WALES) | AVERAGE PERCENTAGE FOR ALL WATER COMPANIES (TOTAL) | AVERAGE PERCENTAGE FOR ENGLAND |
|---------------------|------------------------|---------------------------------|---|--|--------------------------------|
| CURRENT WATER BILL | Easy | 45% | 36% - 52% | 45% | 45% |
| | Difficult | 17% | 13% - 22% | 18% | 18% |
| PROPOSED WATER BILL | Easy | 26% | 19% - 36% | 26% | 27% |
| | Difficult | 38% | 29% - 49% | 40% | 39% |

Arrows next to the numbers mark significant differences from the Total for England and Wales, ↑ = significantly more ↓ = significantly less on a 95% confidence level.

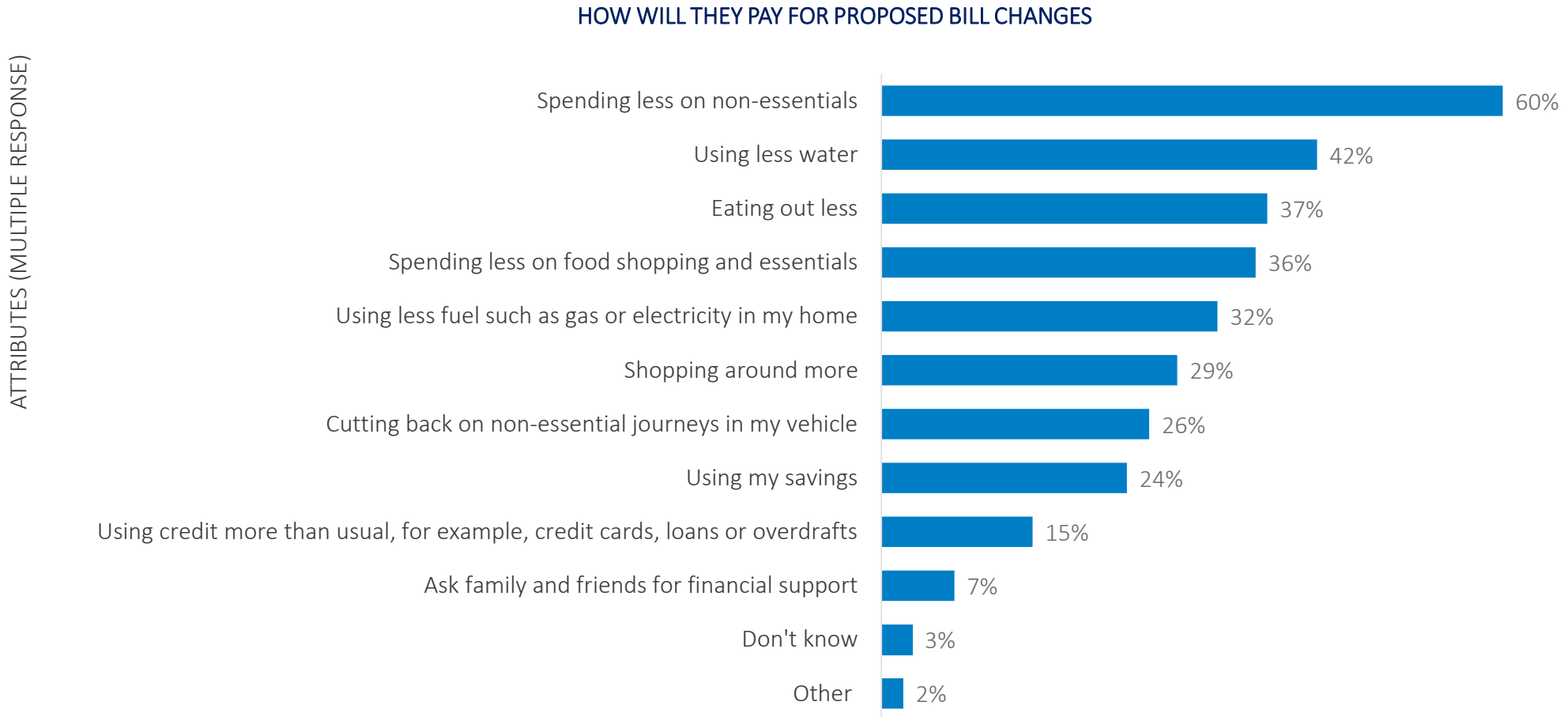
The groups that find the proposed water bill more difficult to afford are among 18-24 years old, females, non-white ethnic groups, DE social grade and/or £26,000 to £36,399 annual household income bands.

| AFFORDABILITY BY SUBGROUPS | | CURRENT AFFORDABILITY | CURRENT AFFORDABILITY | PROPOSED AFFORDABILITY | PROPOSED AFFORDABILITY | BASE SIZE |
|----------------------------|---------------------------------|-----------------------|-----------------------|------------------------|------------------------|-----------|
| ROW% | | NET EASY | NET DIFFICULT | NET EASY | NET DIFFICULT | ROW N |
| | Total | 45% | 17% | 26% | 38% | 500 |
| Age groups | 18-24 | 39% | 27% | 19% | 56% | 34 ! |
| | 25-34 | 44% | 23% | 24% | 45% | 90 |
| | 35-44 | 40% | 22% | 26% | 44% | 89 |
| | 45-54 | 41% | 18% | 15% | 37% | 92 |
| | 55-64 | 52% | 21% | 35% | 35% | 91 |
| | 65-75 | 54% | 6% | 33% | 26% | 70 |
| | 75+ | 42% | 0% | 16% | 27% | 34 ! |
| Gender | Female | 41% | 20% | 20% | 45% | 272 |
| | Male | 50% | 15% | 31% | 30% | 227 |
| | Non-binary / prefer not to say | 0% | 0% | 0% | 0% | 1 ! |
| Social Grade | AB | 60% | 11% | 40% | 32% | 141 |
| | C1 | 52% | 11% | 28% | 33% | 170 |
| | C2 | 46% | 13% | 17% | 38% | 81 |
| | DE | 21% | 33% | 14% | 49% | 108 |
| Household income | Up to £15,599 a year | 27% | 27% | 18% | 41% | 71 |
| | From £15,600 to £25,999 a year | 46% | 19% | 23% | 37% | 86 |
| | From £26,000 to £36,399 a year | 39% | 19% | 23% | 45% | 106 |
| | From £36,400 to £51,999 a year | 45% | 16% | 25% | 34% | 89 |
| | From £52,000 to £72,799 a year | 64% | 12% | 38% | 39% | 66 |
| | From £72,800 and above a year | 71% | 4% | 44% | 22% | 54 |
| | Don't know or Prefer not to say | 33% | 16% | 8% | 38% | 28 ! |
| Ethnic group | NET: British | 46% | 16% | 26% | 37% | 430 |
| | NET: Other British | 42% | 25% | 21% | 41% | 65 |
| | NET: White | 47% | 16% | 26% | 37% | 442 |
| | NET: Other than White | 35% | 29% | 23% | 46% | 51 |

The groups that find the proposed water bill more difficult are billpayers who are finding the current financial situation difficult, have struggled to pay at least one household bill over the last year all or most of the time and/or those with medical vulnerability.

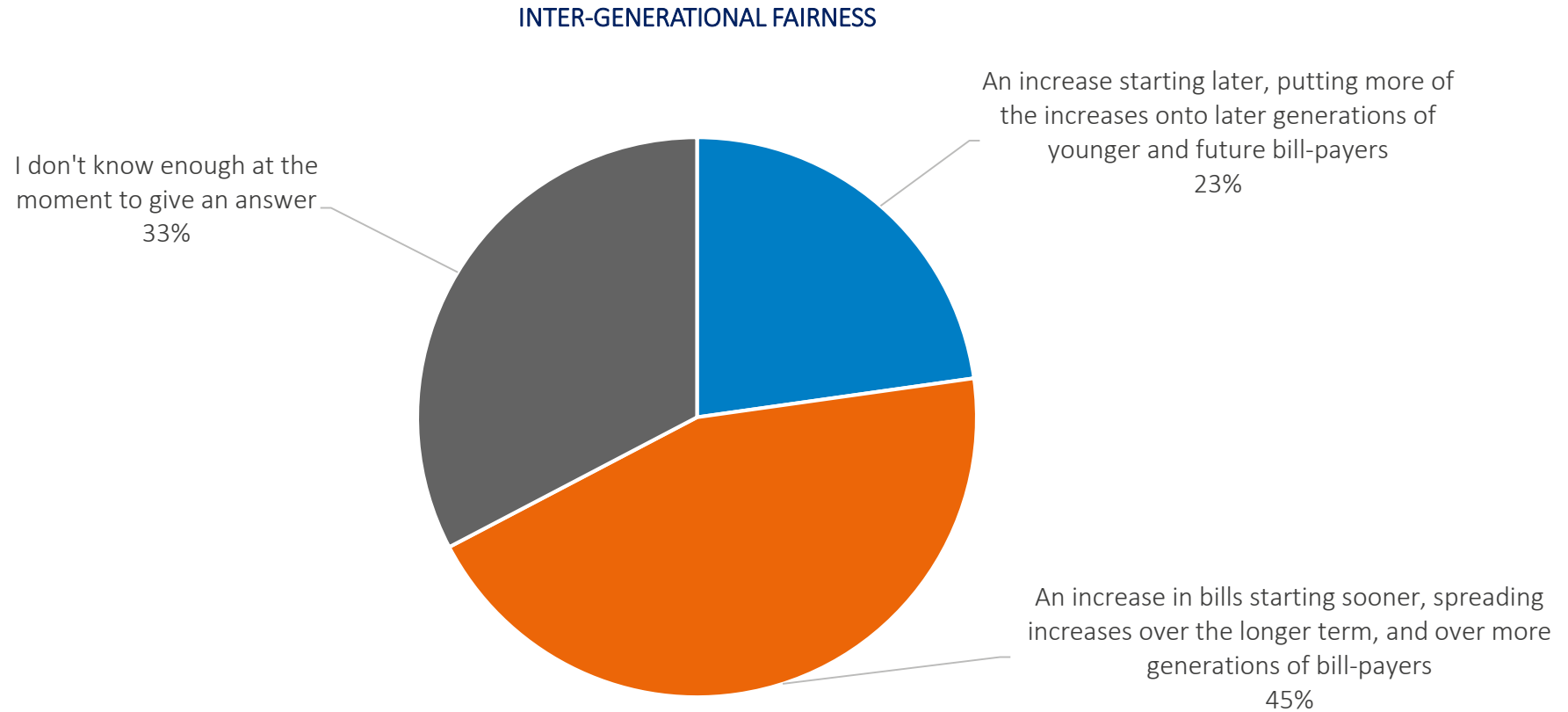
| AFFORDABILITY BY SUBGROUPS | | CURRENT AFFORDABILITY | CURRENT AFFORDABILITY | PROPOSED AFFORDABILITY | PROPOSED AFFORDABILITY | BASE SIZE |
|---|--|-----------------------|-----------------------|------------------------|------------------------|-----------|
| ROW% | | NET EASY | NET DIFFICULT | NET EASY | NET DIFFICULT | ROW N |
| | Total | 45% | 17% | 26% | 38% | 500 |
| Vulnerability | None | 51% | 13% | 31% | 32% | 288 |
| | Medical | 27% | 35% | 11% | 57% | 111 |
| | Communication | 38% | 27% | 26% | 43% | 72 |
| | Life Stage | 49% | 16% | 18% | 33% | 67 |
| | Other | 38% | 24% | 18% | 45% | 199 |
| | Prefer not to say | 28% | 0% | 21% | 53% | 13 ! |
| Struggled to pay at least one household bill over the last year | Rarely or Never | 65% | 2% | 38% | 21% | 292 |
| | All of the time or most of the time | 16% | 59% | 11% | 62% | 72 |
| Current financial situation | Living comfortably or doing alright | 75% | 1% | 43% | 16% | 223 |
| | Finding it quite difficult or very difficult | 14% | 55% | 9% | 68% | 85 |
| 2030 financial situation outlook | A bit better or A lot better | 62% | 11% | 36% | 32% | 165 |
| | A lot worse or A bit worse | 34% | 26% | 16% | 49% | 169 |
| Water meter | Yes | 48% | 15% | 28% | 35% | 285 |
| | No | 44% | 20% | 23% | 40% | 206 |
| | Don't know | 11% | 16% | 11% | 48% | 9 ! |
| IMD Quintile | 1 | 30% | 24% | 15% | 33% | 33 ! |
| | 2 | 52% | 4% | 26% | 15% | 27 ! |
| | 3 | 38% | 4% | 25% | 29% | 24 ! |
| | 4 | 38% | 4% | 29% | 29% | 24 ! |
| | 5 | 56% | 6% | 28% | 28% | 18 ! |
| | Unknown | | | | | 0 |
| Social Tariff | Yes | 17% | 17% | 0% | 50% | 6 ! |
| | No / not available | 46% | 17% | 26% | 37% | 494 |

United Utilities billpayers who would not find the proposed bills easy to afford* were asked what they would do to help pay for the increase in their water bills. Most would spend less on non-essentials or use less water.



* Includes those who found the proposed bills to be neither easy nor difficult to afford

United Utilities billpayers were asked an in principle question about how they would prefer bill increases for long-term investments to be phased. 45% would prefer the bill increase starting sooner vs. 23% later. A third didn't know enough to give an answer.



SUMMARY OF RESULTS - ACCEPTABILITY

Participants were informed of their **water supplier's current performance** and **future targets** for water supply interruptions, drinking water quality, and leakage. The **sewerage service provider's performance was also shown** and included the following service measures: sewage flooding inside properties, sewage flooding outside properties and pollution incidents.

Participants were also shown a **proposal for investments in four areas**: Sewerage services & environment, Protecting water supplies, Improving drinking water quality and Resilience of services to disruption from external events. The delivery of each investment area (e.g., what form it came in, such as the number of smart meters to be fitted) and spending within these areas were specific for each water company.

78% of United Utilities billpayers find the investment proposal acceptable. After being asked about investment proposal acceptability again, but this time alongside a reminder of the proposed bills for 2025-30. The level of non-acceptance doubles, **but 60% still find the proposal acceptable.**

| ACCEPTABILITY | TOP 2 / BOTTOM 2 NET % | PROPORTION FOR UNITED UTILITIES | RANGE FOR ALL WATER COMPANIES (ENGLAND AND WALES) | AVERAGE PERCENTAGE FOR ALL WATER COMPANIES (TOTAL) | AVERAGE PERCENTAGE FOR ENGLAND |
|--|------------------------|---------------------------------|---|--|--------------------------------|
| ACCEPTABILITY OF INVESTMENT PROPOSALS | Acceptable | 78% | 65% - 81% | 75% | 75% |
| | Unacceptable | 15% | 8% - 24% | 15% | 15% |
| ACCEPTABILITY OF INVESTMENT PROPOSALS WITH A REMINDER OF THE BILL CHANGE | Acceptable | 60% | 43% - 67% | 58% | 58% |
| | Unacceptable | 31% | 23% - 47% | 33% | 32% |

Arrows next to the numbers mark significant differences from the Total for England and Wales, **↑** = significantly more **↓** = significantly less on a 95% confidence level.

Q8: Based on everything you have seen and read about this proposal for your water and sewerage services, how acceptable or unacceptable is it to you? BASE: ALL (500)

Q10a: Now, thinking about the proposed bill levels for 2025 to 2030, the investment that is planned in services and the proposed service levels, how acceptable or unacceptable are the proposals to you? BASE: ALL (500)

SUMMARY OF RESULTS - ACCEPTABILITY

The 78% who find the investment proposals acceptable most often cite that the proposals focus on the right services and support the longer term.

REASON FOR THE INVESTMENT PROPOSAL BEING ACCEPTABLE/ TOP 5 REASONS

REASONS (SELECT UP TO 2)



On the other hand, the 15% of those who find the investment proposals unacceptable say this is because the bill increases are too expensive and because the company profits are too high.

REASON FOR THE INVESTMENT PROPOSAL BEING UNACCEPTABLE/ TOP 5 REASONS

REASONS (SELECT UP TO 2)



To understand the acceptability of the investment proposals, we presented billpayers with investment areas within the four categories in **red text** below. The investments included relevant numbers and targets from the Draft Determinations. The aim was to determine which investment proposal within each category was most important to billpayers. Some of these investment areas were shown to respondents of all water companies, and some to a subset of water companies.

The top priorities across the categories for United Utilities billpayers are:

- **Improving sewage treatment processes to help river water quality** in the ‘improving sewerage services and the environment’ area
- **Starting to develop large scale water supply schemes** in the ‘protecting water supplies’ area
- **Replacement of lead supply pipes** in the ‘improving drinking water quality’ area
- **Improving the resilience of treatment works, pipes and technology** in the ‘improving resilience to reduce the risk of disruption to services’ area:

Improvements for taste, odour and colour of drinking water were included in the investment total, but not shown. It is possible that, had they been included, they would have affected the priority order for services within the drinking water quality area.

| IMPROVING SEWERAGE SERVICES AND THE ENVIRONMENT | Column % |
|--|-----------------|
| Improving sewage treatment processes to help river water quality | 42% |
| Reducing the use of storm overflows which release sewage into rivers | 33% |
| Increasing the capacity of sewage treatment works | 13% |
| Monitoring river water quality | 8% |
| Don't know/can't say | 5% |

| IMPROVING DRINKING WATER QUALITY | Column % |
|---|-----------------|
| Replacement of lead supply pipes | 59% |
| Additional water treatment processes | 35% |
| Don't know/can't say | 6% |

| PROTECTING WATER SUPPLIES | Column % |
|----------------------------------|-----------------|
| Reducing leakage | 78% |
| Fitting smart water meters | 19% |
| Don't know/can't say | 3% |

| RESILIENCE OF SERVICES TO DISRUPTION FROM EXTERNAL EVENTS | Column % |
|---|-----------------|
| Improving the resilience of treatment works, pipes and technology | 86% |
| Improving security and resilience to cyber attacks | 10% |
| Don't know/ can't say | 4% |

QUOTAS VS. ACHIEVED SAMPLE

England & Wales 2021 census regional gender and age profile and 2021 Census Approximated Social Grade figures* were applied to company quotas.

| QUOTA SAMPLE STRUCTURE UNITED UTILITIES | COLUMN % | TARGET | ACHIEVED UNWEIGHTED % | ACHIEVED WEIGHTED % |
|--|----------|--------|-----------------------|---------------------|
| AGE GROUPS | 18-24 | 11% | 7% | 6% |
| | 25-34 | 17% | 18% | 17% |
| | 35-44 | 16% | 18% | 15% |
| | 45-54 | 17% | 18% | 18% |
| | 55-64 | 16% | 18% | 20% |
| | 65+ | 24% | 21% | 24% |
| GENDER | Female | 48% | 54% | 50% |
| | Male | 52% | 45% | 50% |
| | Other | open | 0% | 0% |
| SOCIAL ECONOMIC GRADE | AB | 21% | 28% | 25% |
| | C1 | 33% | 34% | 32% |
| | C2 | 20% | 16% | 19% |
| | DE | 26% | 22% | 25% |

S1: How old are you? BASE: ALL (500)

S2: Please select your gender. BASE: ALL (500)

Q11: Please indicate which one of the following best describes the profession of the chief income earner in your household. BASE: ALL (500)

*<https://www.mrs.org.uk/pdf/JICPOPS%20regional%20evaluation%20of%20Census%202021%20ASG.pdf>

Constructing the research materials

Proposed bills from 2025-30

- For most companies, this was based on data provided by Ofwat and adjusted to include forecast inflation; push to web respondents saw a personalised bill profile, online panel respondents saw a bill profile based on the average household water charges for United Utilities customers*
- For Northumbrian Water and Essex and Suffolk Water, South Staffs Water and Cambridge Water, South West Bournemouth and Bristol Water, the respective companies provided the data for CCW/Impact to build specific bill profiles for each area – this meant that respondents saw something more representative of the potential bills changes in their area
- Respondents from water only companies saw a proposed bill which included proposed sewerage service charges – this was made clear in the supporting text

Water company performance data

- Performance data was based on Ofwat's Water Company Performance report 2022-23, and future performance targets as published in the Draft Determinations

Investment proposal stimulus

- This was based on Ofwat's Overview document for each water company's Draft Determination
- Where possible the wording for these was generic to support comparisons between companies; context for Wales was included
- Where helpful for respondents, company specific examples were provided under the generic wording, e.g., for large scale water supply developments

Investment costs

- Respondents saw the proposed investment for each investment area – the total amount over the five years from 2025-30

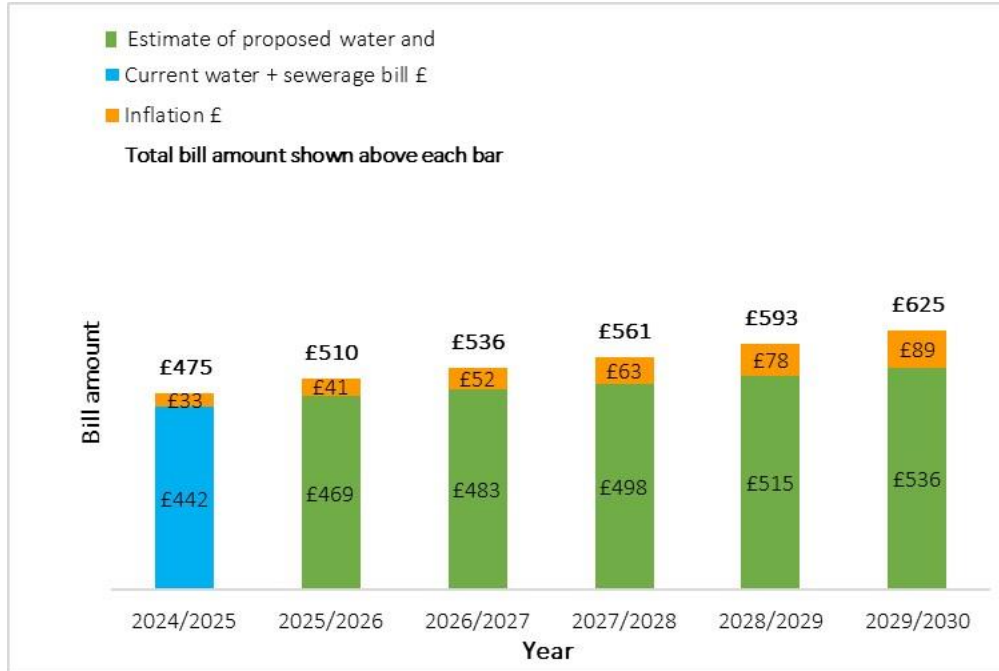
The questionnaire can be viewed [here](#)



* Including water & sewerage charges

Bill profile shown at Q4 & Q10a (example for panel where average bill profile was shown)

UNITED UTILITIES



Performance tables & charts shown before Q8, TABLE 1, CHART 1: Water supply interruption over 3 hours

UNITED UTILITIES

TABLE 1
COMPANY PERFORMANCE:
Water supply interruption over 3 hours
 (the average length of time properties are without water in hours, minutes, seconds - hh:mm:ss)




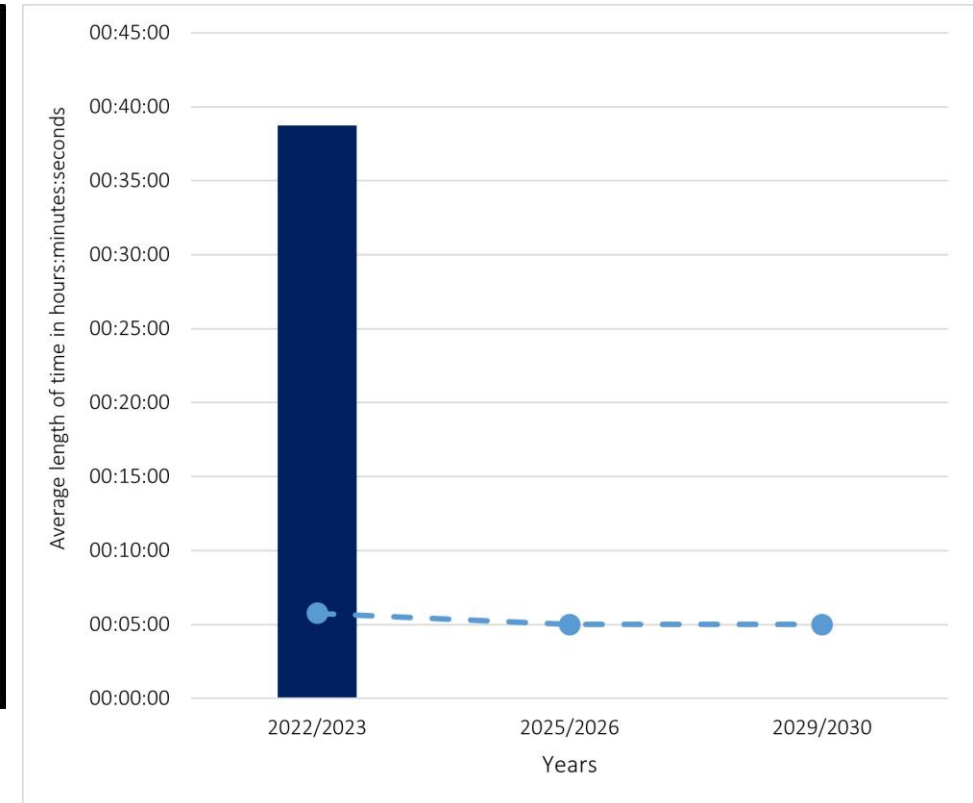
| | | |
|--|-----------------|---|
| Portsmouth Water | 00:02:21 | <p>Better Performance</p>  <p>Poorer Performance</p> |
| SES Water | 00:03:51 | |
| Wessex Water | 00:04:10 | |
| Cambridge Water | 00:04:29 | |
| South Staffs Water | 00:04:29 | |
| Bristol Water | 00:08:03 | |
| Essex and Suffolk Water | 00:08:17 | |
| Northumbrian Water | 00:08:17 | |
| South West Water including Bournemouth | 00:08:42 | |
| Severn Trent Water | 00:09:10 | |
| Yorkshire Water | 00:09:27 | |
| Affinity Water | 00:12:53 | |
| Anglian Water including Hartlepool | 00:14:35 | |
| Hafren Dyfrdwy | 00:18:00 | |
| Thames Water | 00:19:54 | |
| United Utilities | 00:38:45 | |
| Dŵr Cymru Welsh Water | 00:44:31 | |
| Southern Water | 01:28:10 | |
| South East Water | 03:02:21 | |

CHART 1
PROPOSALS FOR YOUR COMPANY'S PERFORMANCE FROM 2025 TO 2030
Water supply interruption over 3 hours

(the average length of time properties are without water in hours, minutes, seconds - hh:mm:ss)
 Current performance 
 Target performance 



Performance tables & charts shown before Q8, TABLE 2, CHART 2: Drinking water quality

UNITED UTILITIES

TABLE 2

COMPANY PERFORMANCE:

Drinking water quality

(number of customer contacts about drinking water quality per 1,000 population)

| | | |
|--|-------------|--|
| Portsmouth Water | 0.42 | <p>Better Performance</p>   <p>Poorer Performance</p> |
| Thames Water | 0.44 | |
| Affinity Water | 0.56 | |
| SES Water | 0.64 | |
| Cambridge Water | 0.65 | |
| South Staffs Water | 0.65 | |
| Severn Trent Water | 0.85 | |
| Essex and Suffolk Water | 0.96 | |
| Northumbrian Water | 0.96 | |
| Anglian Water including Hartlepool | 1.01 | |
| Yorkshire Water | 1.02 | |
| Wessex Water | 1.14 | |
| South East Water | 1.16 | |
| Southern Water | 1.17 | |
| Hafren Dyfrdwy | 1.18 | |
| Bristol Water | 1.21 | |
| United Utilities | 1.41 | |
| South West Water including Bournemouth | 1.51 | |
| Dŵr Cymru Welsh Water | 2.35 | |

CHART 2

PROPOSALS FOR YOUR COMPANY'S PERFORMANCE FROM 2025 TO 2030

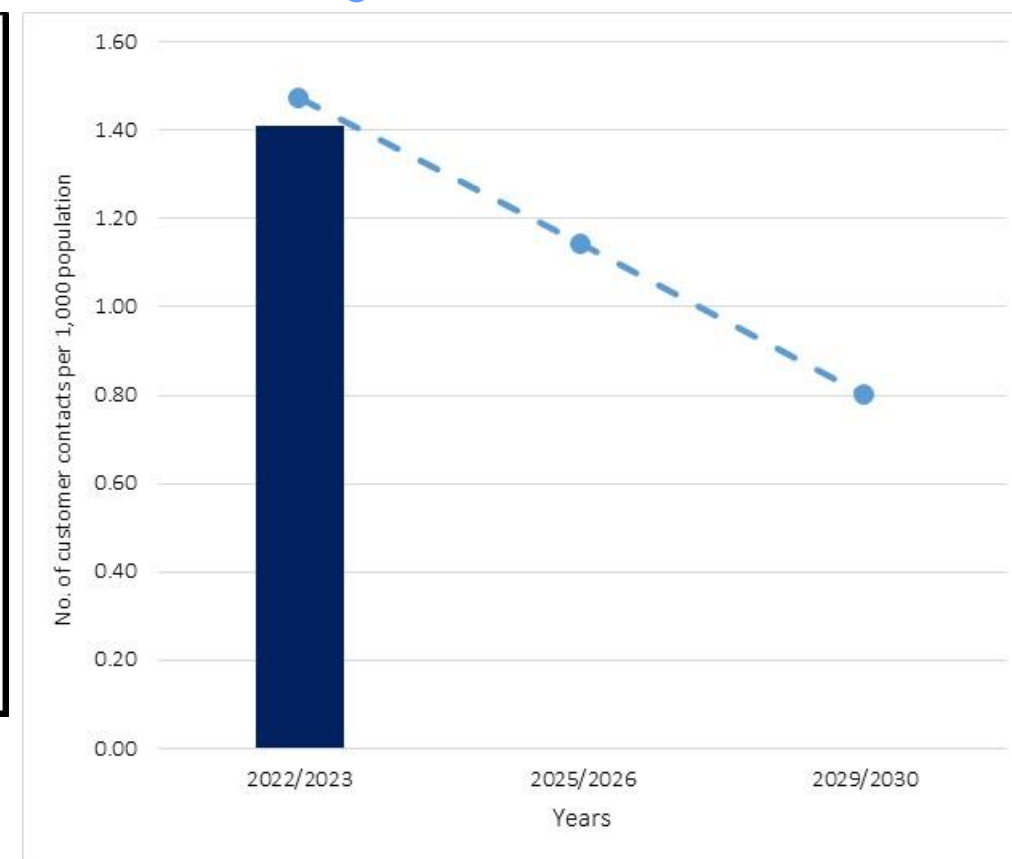
Drinking water quality

(number of customer contacts about drinking water quality per 1,000 population)

Current performance



Target performance



Performance tables & charts shown before Q8, TABLE 3, CHART 3: Leaks

UNITED UTILITIES



TABLE 3
COMPANY PERFORMANCE:

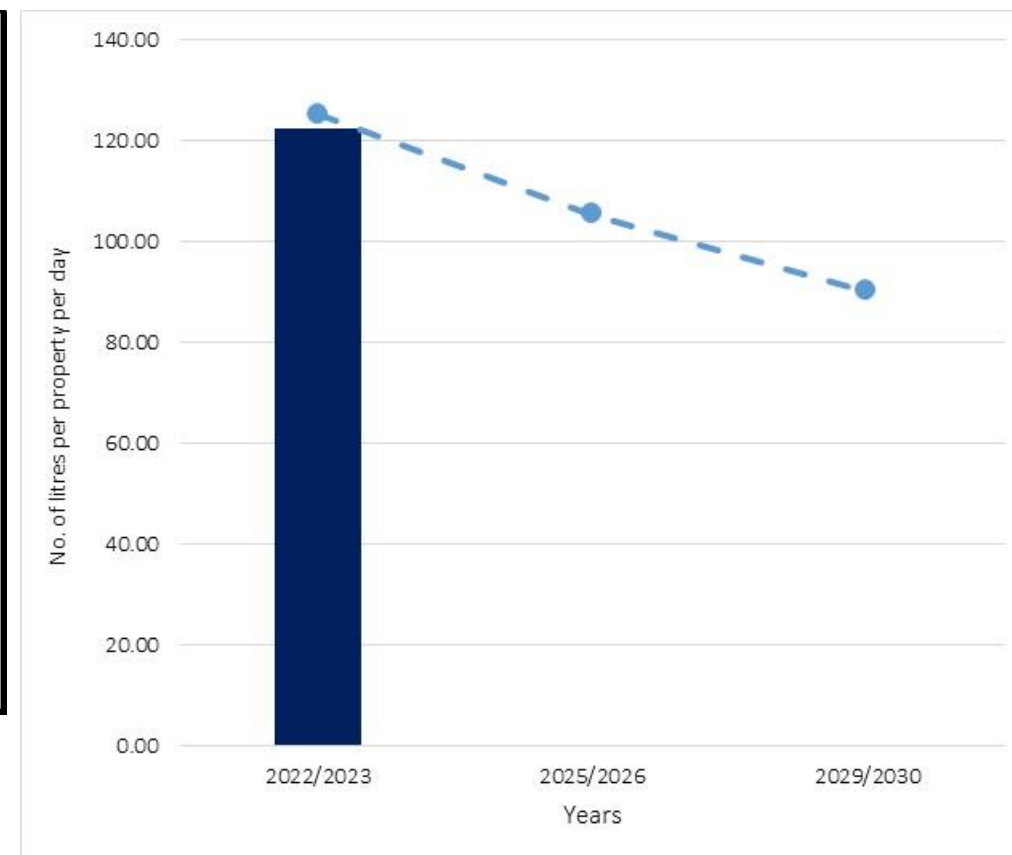
Leaks
(the number of litres of water leaked per property per day)

| | | |
|--|---------------|--|
| Bristol Water | 66.15 | <p>Better Performance</p>   <p>Poorer Performance</p> |
| Essex and Suffolk Water | 72.43 | |
| SES Water | 76.22 | |
| Anglian Water including Hartlepool | 78.16 | |
| Portsmouth Water | 84.96 | |
| Cambridge Water | 86.44 | |
| Southern Water | 87.02 | |
| South East Water | 89.56 | |
| Affinity Water | 100.46 | |
| South West Water including Bournemouth | 103.34 | |
| Northumbrian Water | 103.68 | |
| Wessex Water | 104.15 | |
| Severn Trent Water | 107.93 | |
| South Staffs Water | 108.99 | |
| Yorkshire Water | 119.86 | |
| United Utilities | 122.26 | |
| Thames Water | 149.37 | |
| Dŵr Cymru Welsh Water | 164.79 | |
| Hafren Dyfrdwy | 165.17 | |

CHART 3
PROPOSALS FOR YOUR COMPANY'S PERFORMANCE FROM 2025 TO 2030

Leaks
(the number of litres of water leaked per property per day)

Current performance 
Target performance 



Performance tables & charts shown before Q8, TABLE 7, CHART 7: Sewage flooding inside properties

UNITED UTILITIES

TABLE 7
COMPANY PERFORMANCE:
Sewage flooding inside properties
 (number of properties flooded by sewage for every 10,000 properties connected to the public sewer)

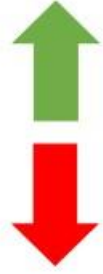


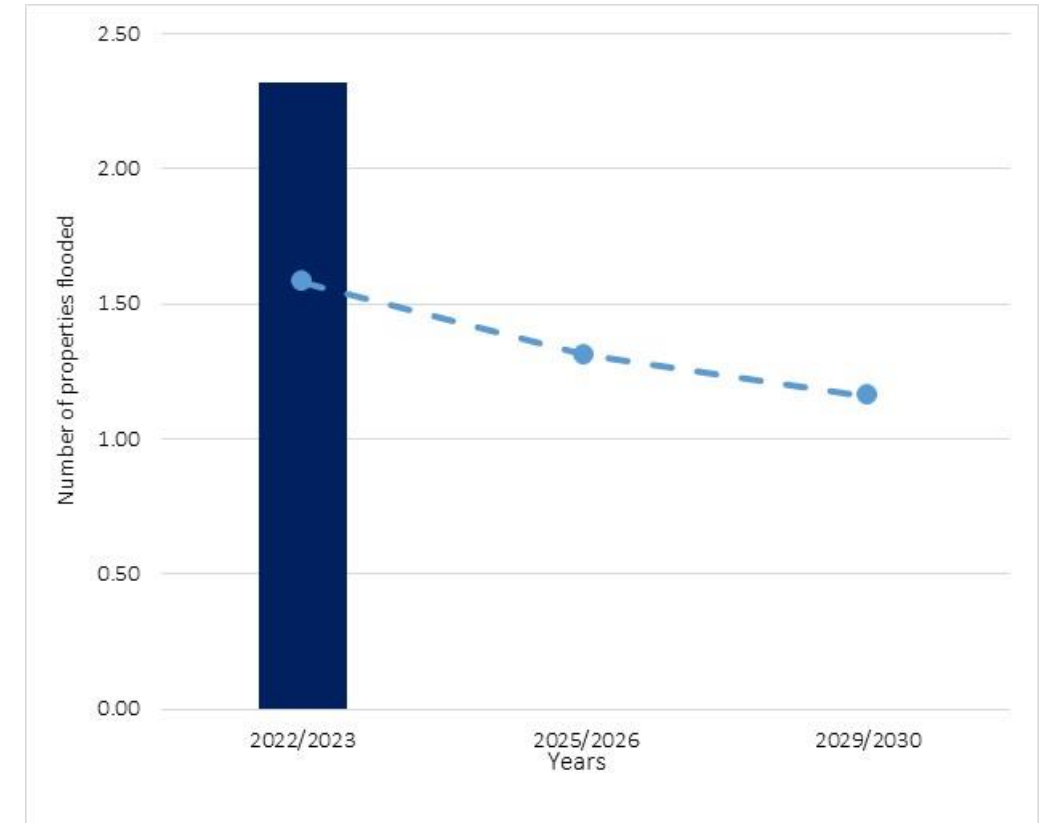
| | | |
|--|-------------|---|
| South West Water including Bournemouth | 0.63 | <p>Better Performance</p>  <p>Poorer Performance</p> |
| Dŵr Cymru Welsh Water | 1.14 | |
| Northumbrian Water | 1.21 | |
| Wessex Water | 1.31 | |
| Hafren Dyfrdwy | 1.38 | |
| Severn Trent Water | 1.65 | |
| Anglian Water including Hartlepool | 1.69 | |
| Thames Water | 1.91 | |
| Southern Water | 2.25 | |
| United Utilities | 2.32 | |
| Yorkshire Water | 2.67 | |

CHART 7
PROPOSALS FOR YOUR COMPANY'S PERFORMANCE FROM 2025 TO 2030
Sewage flooding inside properties

(number of properties flooded by sewage for every 10,000 properties connected to the public sewer)
 Current performance 
 Target performance 



Performance tables & charts shown before Q8, TABLE 8, CHART 8: Sewage flooding outside properties

UNITED UTILITIES

TABLE 8
COMPANY PERFORMANCE:
Sewage flooding outside properties
 (number of external areas flooded by sewage for every 10,000 properties connected to the public sewer)





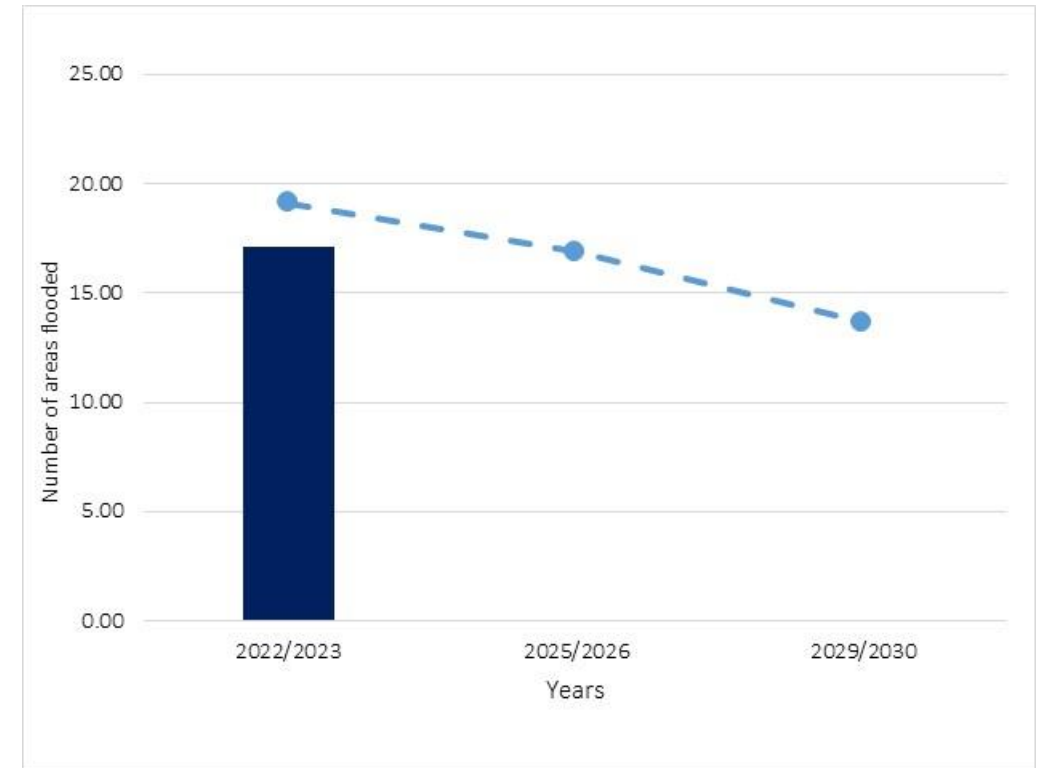
| | | |
|------------------------------------|--------------|---|
| Severn Trent Water | 12.69 | <p>Better Performance</p>   <p>Poorer Performance</p> |
| Anglian Water including Hartlepool | 16.10 | |
| United Utilities | 17.13 | |
| Wessex Water | 17.83 | |
| Thames Water | 18.41 | |
| Southern Water | 18.46 | |
| Hafren Dyfrdwy | 19.77 | |
| Yorkshire Water | 22.75 | |
| Northumbrian Water | 23.10 | |
| South West Water including | 23.19 | |
| Dŵr Cymru Welsh Water | 24.42 | |

CHART 8
PROPOSALS FOR YOUR COMPANY'S PERFORMANCE FROM 2025 TO 2030
Sewage flooding outside properties

(number of external areas flooded by sewage for every 10,000 properties connected to the public sewer)
 Current performance 
 Target performance 



Performance tables & charts shown before Q8, TABLE 9, CHART 9: Pollution incidents

UNITED UTILITIES

TABLE 9
COMPANY PERFORMANCE:
Pollution incidents
 (the number of incidents per 10,000 km of sewer pipes)

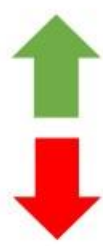
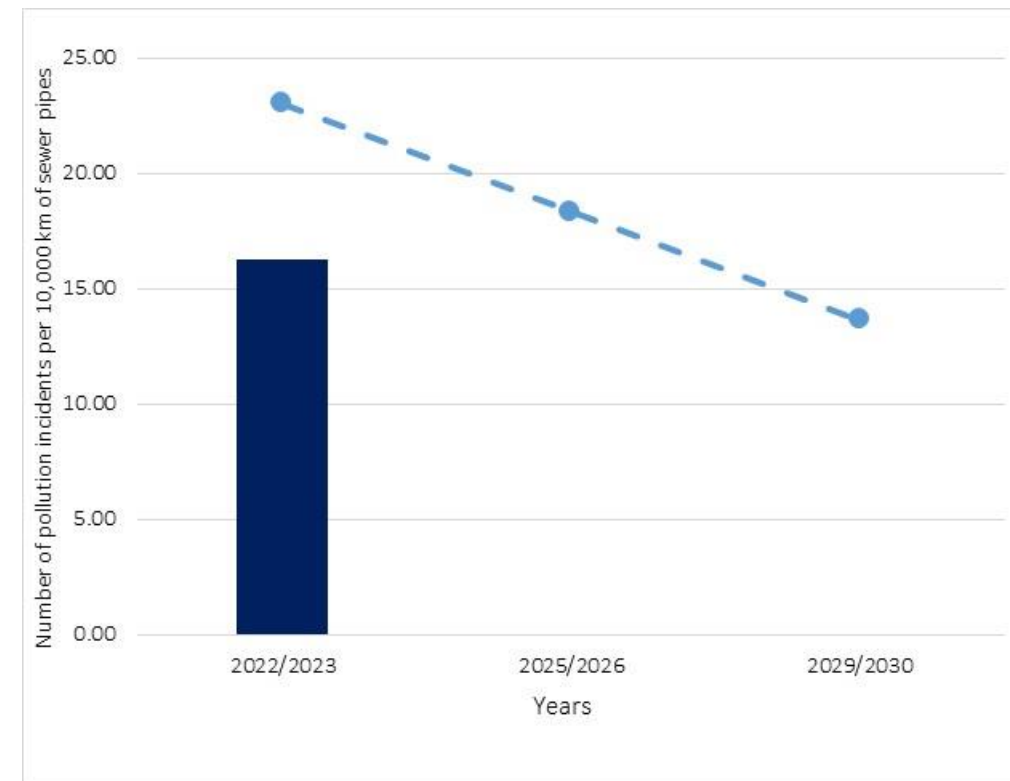
| | | |
|--|--------------|---|
| United Utilities | 16.29 | <p>Better Performance</p>  <p>Poorer Performance</p> |
| Northumbrian Water | 19.98 | |
| Severn Trent Water | 20.64 | |
| Yorkshire Water | 22.39 | |
| Dŵr Cymru Welsh Water | 24.55 | |
| Thames Water | 30.37 | |
| Wessex Water | 31.48 | |
| Anglian Water including Hartlepool | 33.36 | |
| Hafren Dyfrdwy | 39.84 | |
| South West Water including Bournemouth | 61.93 | |
| Southern Water | 90.11 | |

CHART 9
PROPOSALS FOR YOUR COMPANY'S PERFORMANCE FROM 2025 TO 2030
Pollution incidents
 (the number of incidents per 10,000 km of sewer pipes)
 Current performance 
 Target performance 



Investment text for **Sewerage services and the environment** before Q7b

UNITED UTILITIES



Sewerage services and the environment

The proposal is for United Utilities to invest £4.1 billion over 2025 - 2030 to improve the environment.

The biggest areas of investment are:

£1.8 billion to reduce the use of storm overflows which release sewage into rivers.

Storm overflows release sewage, often mixed with rainwater, into rivers or seas when sewers are full. This reduces the risk of homes and properties being flooded with sewage. This practice can also affect the quality of water in rivers. By reducing spill numbers, sewage may have a less detrimental effect on river water quality. All storm overflows now have a monitor fitted to measure how often and how long each is used for.

The proposed performance target is to reduce the use of storm overflows by 55%, down to an average of 19 spills per overflow by 2029-30. The company will meet this target by developing natural solutions like wetlands to slow the flow of water and help keep rainwater out of sewers.

£988 million to improve sewage treatment processes.

The company will improve sewage treatment processes at Salford, Eccles and Davyhulme treatment works to improve treated sewage water that is put back into rivers etc. This will mean that the quality of treated sewage water that is put back into rivers etc from these treatment works is better for wildlife.

£963 million to improve sewage treatment processes to prevent nutrient pollution in rivers.

High levels of nutrients such as nitrogen and phosphorous occur in rivers due to things like rainwater run-off from farmland and sewage release into rivers. These nutrients mean that plants grow more quickly, taking oxygen out of the water for fish etc., harming wildlife and habitats. Improving treatment processes at sewage treatment works, will help to reduce the level of things like phosphorus before the treated water is returned to rivers and seas.

The company has a target to reduce the amount of phosphorus entering rivers from water company activities by 31%. They will develop wetlands which let natural processes filter the treated sewage water before it is treated and/or returned to rivers - this will improve the quality of the water before it is put back into rivers.

£80 million for new targets to monitor river water quality.

Companies must fit 'continuous river water quality monitors' at various points in rivers to get a broader understanding of how their sewage operations affect water quality.

600 river water quality monitors will be fitted at high priority sites by United Utilities. These will provide continuous real-time information on the effect of the company's activities on watercourses. **This will help the company identify pollution and water quality issues more quickly.**

Investment text for **Protecting water supplies** before Q7b

UNITED UTILITIES



Protecting water supplies

The proposal is for United Utilities to invest £461 million over 2025 - 2030 to ensure there is enough water to go around.

The biggest areas of investment are:

£213 million to fit smart water meters.

Smart meters help water companies to manage leakage as they provide more frequent information about water use which alerts them to leaks more quickly than meters which need to be read manually. They also help people keep track of the water they are using.

Fit smart water meters at 920,000 properties from 2025 -2030. Most of these will be new smart meter installations at properties that have not previously had a meter, some will replace existing water meters which need to be read manually. **The target is to reduce household water use by 5% from 2025 to 2030.**

£150 million to reduce leaks.

This will involve various approaches, such as reducing water supply pressure where appropriate, to reduce leakage, more sensors to monitor the water supply network to detect leaks, and renewing water mains. **The target is to reduce leakage by 5% for households by 2030.**

Investment text for Improving drinking water quality before Q7b

UNITED UTILITIES



Improving drinking water quality

The proposal is for United Utilities to invest £189 million over 2025-2030 to improve the quality of drinking water.

This will include:

£108 million for the taste, odour and colour of water.

The company will invest in its network of pipes and/or treatment works to reduce the chance of their condition affecting the taste, odour and colour of drinking water.

£47 million to replace lead supply pipes which join properties to water mains.

Some older properties have lead supply pipes. To ensure water is safe to drink, it is treated with a safe chemical which stops the lead leaking out of the pipe and entering the water. However, lead can be a health risk for the very young and old, so water companies are replacing this pipework over time.

United Utilities has a target to replace 36,605 lead supply pipes from 2025 to 2030 to improve drinking water quality.

£34 million for additional water treatment processes.

Sometimes, the water in the environment (rivers, lakes, reservoirs) which water companies take to treat for drinking water, needs extra levels of treatment to meet drinking water quality requirements. The proposed investment will help to reduce contacts from consumers about the taste, odour and appearance of tap water.

Investment text for Improving the resilience of services to disruption from external events before Q7b

UNITED UTILITIES



Improving the resilience of pipes, sewers and treatment works to reduce the risk of disruption to services

The proposal is for United Utilities to invest £172 million over 2025 - 2030 to improve the resilience of services

This will include:

£135 million to improve resilience for the company's treatment works and other operational sites.

This includes more back-up power generators to reduce the chance of disruption due to heat or power failure and flood defences to protect key sites like treatment works.

£37 million on other security, including cyber.

This includes cyber security, in order to meet new statutory requirements.

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Impact Research, located in Walton-On-Thames, Surrey, was founded in 2010 by Darryl Swift and Dr. David Pearmain, focusing on research in utilities sector from the start. In 2017, we achieved ISO 20252 accreditation, which we've renewed annually since.

Over the years, we've been supporting clients by combining quantitative and qualitative methods to deliver actionable insights. Our dedicated team has built a strong reputation for excellence and innovation.

We've successfully executed projects across various sectors, including FMCG and retail, gas, electricity, water, and local authorities.

In this report, we explored water bill acceptability and affordability for the next 5 years, drawing on our expertise to provide valuable insights and recommendations for CCW and Ofwat.

